Job Aid 15

Plan for Exchange 2000 Pilot and Deployment

Target audience:

- *The deployment team*
- *IT Director*

Level:

- *Technical*
- *Detailed*

References:

Business case for adopting Exchange 2000
Business case for planning phase

Executive Summary

(Corporation Name) is planning to pilot Exchange 2000 as the new organizational messaging system. This document contains the detailed planning for the pre-pilot, pilot and deployment phases of this operation. It should be read by all members of the deployment team.

The outline dates for this project are as follows:

Planning	(date – date)
Pre-Pilot	(date – date)
Pilot	(date – date)
Deployment	(date)

For more information, see http://intranet/messaging/exchange/pilot/default.htm.

Introduction

As detailed in Ref A., changes in (working methods/operational requirements/business model) means that the company is planning to migrate to Exchange 2000. Reference B. presented to management the case to carry out the planning phase for the Exchange 2000 pilot; this paper is the result of that planning.

Aim

The aim of this document is to document the plan for the implementation of the Exchange 2000 pre-pilot, pilot and migration to production thus co-ordinating the actions of all members of the deployment team.

Background

As indicated in the reference documents above, (mail system) is now proving to be a barrier to changes in operation practice. Therefore, it is proposed to run a pilot testing procedure to establish the following:

- Ensure that Exchange 2000 can operate as planned.
- Confirm the benefits listed above will be useable.
- Calculate and mitigate the risks associated with the migration process.
- Demonstrate the effectiveness of the user training program.

This is a preview edition of the Microsoft Exchange 2000 Server Upgrade Series. The final documentation will be available in November 2000.

- Prove the viability of the migration process.

The pilot system will be suitably specified so that it can be migrated to become the production mail servers for Exchange 2000. This will give the following advantages:

- It will significantly reduce the risk to the organization from the migration process.
- It will allow for an extended trial and familiarization timetable.
- Any unexpected migration issues will not bring down the current messaging system down.
- The users will not be affected by installation problems.
- It allows isolation of the pilot and production mail systems.

Pilot Aim

The aims of this pilot are as follows:

- To prove the suitability of Exchange 2000 as a replacement messaging system
- To provide experience of the product without affecting the remainder of the network
- To demonstrate the suitability of the training program
- To ensure that the pilot system can be migrated to production

Features to Implement in the Pilot

Exchange 2000 is a multi-faceted messaging system; it would therefore not be practical to pilot every aspect of this product's operation. Hence the pilot will be confined to testing the following features:

- Unified Mailbox
- Public folder contacts and diaries
- Offline Folders
- Feature four
- Etc.

In order to prevent the pilot from overrunning, no other features will be included as part of the pilot. However, informal testing and experience gained from using other features may be included in the project database.

Project Database

A project database has been set up on the corporate intranet. It is accessible via http://intranet/messaging/exchange/pilot/default.htm. The site is linked to a SQL server database that will be the repository of information from the pilot project. The database also contains a list of all reference documents, background information and other data connected with this project. Please make yourself familiar with the operation of this database and how to record information from the pilot program.

Pilot Main Location

The location of the servers during the pre-pilot and pilot phases will be in (building) room number (x). Please note that (special restrictions such as security) apply.

During the deployment phase, the Exchange servers will be moved into prepared positions in (rack number). (Cabling company) will be visiting on (date) to rewire the racks.

Hardware Specification

The hardware specification is at Appendix A. Note the use of (clustering or other component) for increased data security.

Software

The software requirements are at Appendix B. (Windows 2000 Advanced Server is being used for clustering support).

Note that 10 Client Access Licences are being purchased for the pre-pilot and 50 for the pilot. The remainder of the CALs will be ordered prior to deployment.

Deployment Phases

The pilot and deployment will progress in the following phases:

Phase	Name	Dates
1	Hardware & Software Delivery	
2	Install Exchange 2000 on the Pilot Server(s)	
3	Technical training (Technology Evangelists, Pre-Pilot Users and HelpDesk).	
4	Run Pre-Pilot	
5	Evaluate Results of Pre-Pilot	
6	Pilot User Training	
7	Run Full Pilot	
8	Evaluate Results of Full Pilot	
9	Finalize Plan of Move from Pilot to Production	
10	End User & Management Training	
11	Implement Move from Pilot to Production	
12	Carry out Post-Migration Tasks	
13	Deploy Client Software	
14	Monitor for Correct Operation	
15	Decommission Legacy Messaging System	

Appendix C shows a project timeline.

Phase 1 – Hardware and Software Delivery

The order for the hardware from our preferred suppliers should be confirmed shortly. Delivery is expected to take (number) days.

Phase 2 – Install Exchange 2000 on the Pilot Server(s)

Phase details in here.

Phase 3 – Technical training (Technology Evangelists, Pre-Pilot Users and HelpDesk)

The training program for the initial training is at Appendix D. Technical training will take place in (conference room x) on (date). (name) and (name) are responsible for setting up this classroom on (date). The set-up instructions are at Appendix E and are the same for all training phases. The syllabi for all the training programs are at Appendix F.

Phase 4 – Run Pre-Pilot

Detailed breakdown of tasks and responsibilities.

Phase 5 – Evaluate Results of Pre-Pilot

Once the pre-pilot has been completed, there will be an analysis to extract any lessons from the pilot process. This will be conducted in meeting room (x) on (date). All pre-pilot users are requested to be present.

Phase 6 – Pilot User Training

The training program for the pilot users is at Appendix D and is identical to that being provided for the end users. Pilot user training will take place in (conference room x) on (date). (name) and (name) are responsible for setting up this classroom on (date). The set-up instructions are at Appendix E and the syllabus is at Appendix F.

Phase 7 – Run Full Pilot

The full pilot will take place between (date) and (date). A full instruction will be issued after the analysis of the pre-pilot. However, note that the full pilot will be a scaled down version of the production deployment in order to discover any problems that might result from the real thing.

Phase 8 – Evaluate Results of Full Pilot

Once the pilot has been completed, a debrief will be carried out on (date) at (location) at (time). Users will also be asked to email any comments that they have before this meeting.

Phase 9 – Finalize Plan of Move from Pilot to Production

With the evaluation of the results from the full pilot, the plan of the move from pilot to production will be finalized. A further briefing will be held at (location) (time) (date). It is requested that all TEs, helpdesk and the full project team are present.

Phase 10 – End User & Management Training

The final phase of training will take place at (location) (dates). Department heads will be allocated training spaces throughout the program to prevent all users from one office being on training at the same time. Management training for department heads and above will take place on (dates).

Phase 11 – Deploy Client Software

Client software will be deployed between (dates) using (method). (Team members) will be responsible for carrying this out, which must be completed by (date).

Phase 12 – Implement Move from Pilot to Production

The move from Pilot to Production will take place at (time) on (date). Note that all team members will be required until the migration is complete. Further details will be provided in the deployment plan.

Phase 13 – Carry out Post-Migration Tasks

Detailed lists of post-migration tasks will be issued as part of the deployment plan.

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Phase 14 – Monitor for Correct Operation

New monitoring guidelines will be distributed to server operators and will be posted in the server room.

Phase 15 – Decommission Legacy Messaging System

Assuming correct operation of Exchange 2000, the (type) mail system server will be decommissioned on (date). This server will be rebuilt as a (server type)/sold/given to charity.

Summary

This Exchange 2000 pilot and deployment is a major operation. We have to make sure that not only do we get the deployment right but that we keep the remainder of the network running as well. At the time for changeover, we have to be very efficient at ensuring that we get the migration to work correctly and that the mailboxes are moved over successfully.

This process will require considerable commitment and professionalism from everyone involved to ensure the organization's successful migration to Exchange 2000.

(Name)
Network Manager
(Organization Name)

Appendix A – Hardware Requirements
Appendix B – Software Requirements
Appendix C – Project Timeline
Appendix D – Pilot Users Training Program
Appendix E – Set-up Instructions for Training Room
Appendix F – Training Program Syllabi
(you should add these appendixes as required)

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